Post Upgrade Checklist

Site _____ Date Started: _____
Area _____ Date Completed: _____

Item

Task to Configure IMMEDIATELY after 2014 Upgrade

EHR GUI Template(s)	Complete	**Comments**
Import/Assign 2014 EHR GUI Template to end users	☐	

EHR SNOMED Search [Electronic Health Record (EHR) Setup Guide Section 13.0]	Complete	**Comments**
Verify that all ACTIVE users have the Secondary Menu: BSTSRPC & BMXRPC	☐	

SNOMED/CPT PickList [Electronic Health Record (EHR) Setup Guide Section 11.1, 11.2 & recorded sessions]	Complete	**Comments**
BGO Picklist Update	☐	
Import customized SNOMED picklist created on area training DB before upgrade	☐	
Remove unnecessary National SNOMED picklist	☐	
Modify National SNOMED picklist (if needed)	☐	
Import CPT superbills w/o POV associations created on area training DB before upgrade	☐	

Consults [Electronic Health Record (EHR) Setup Guide Section 8.1, 8.2, 8.3]	Complete	**Comments**
Enable Clinical Indication Field BEHOORPA CLINICAL INDICATOR XPAR Parameter for Consult Orders	☐	
Set the Clinical Indication Field as Optional or Required	☐	
Define Consult Type SCT (SNOMED Consult Type) for Consult Specialty/Service	☐	

Clinical Reminders [See Clinical Reminders (PXRM) User Manual & Recorded Reminder Sessions]	Complete	Comments
Remove and Inactivate Mammogram Reminder	☐	
Install 3 new Mammo reminders	☐	
Install all Immunization reminders from exchange (you do not have to add to Coversheet)	☐	
Check existing reminders to ensure nothing is significantly change in formatting	☐	
Check existing reminders to determine if any need immediate updating	☐	
Configure parameter PXRM GUI REMINDERS ACTIVE = Yes	☐	
Configure parameter ORQQPX NEW REMINDERS PARAMS = Yes	☐	
Evaluate Reminder/Reminder dialogs that store POVs & Problems	☐	

TIU [See Recorded Sessions for more details]	Complete	Comments
Update V POV and V POV Multiline objects with V Prob w/o dates object in templates	☐	

VA Health Summary Components (BHS) [See Recorded Sessions for more details]	Complete	Comments
Rebuild Ad Hoc List	☐	

Health Summaries & Health Summary Buttons [See Recorded Sessions for more details]	Complete	Comments
Build Health Summaries and modify health summary buttons (as needed)	☐	

I Button [Electronic Health Record (EHR) Setup Guide Section 15.1]	Complete	Comments
Set BGO Default Web Search Site (System or Division)	☐	

CCDA [Electronic Health Record (EHR) Setup Guide Section 6.3, 6.5, 6.6]	Complete	Comments
Configure CCDA Generator BEHOCCD URL under XPAR Parameters	☐	
Setting the Server IP Address and Port for CCDA VistA Broker	☐	
Create a user to enable storage to VistA Imaging for CCDA	☐	

Task to setup/configure SOON after Upgrade

Clinical Reminders [See Clinical Reminders (PXRM) User Manual & Recorded Reminder Sessions]	Complete	Comments
Update reminders with the v2.0 set	☐	
Prioritize w/ reminders you need to attest for MU2	☐	
Review new functionality (reminders you wanted to build may now be possible)	☐	

TIU [See TIU 0100o Notes pdf & TIU 0100.1011o pdf]	Complete	Comments
Clean up and map note titles over time (users will not notice changes)	☐	
Incorporate new TIU Objects into templates	☐	

EHR Design mode [See Recorded Sessions]	Complete	Comments
Add direct tab	☐	
HIE Viewer Tab	☐	

Configure RxNorm for Drugs [Electronic Health Record (EHR) Setup Guide Section 12.1]	Complete	Comments
Setup APSP RXNORM NDC LOOKUP XPAR Parameter *Sites with inhouse = Local (default) <OR> sites without pharmacy = Product*	☐	

CCDA - Direct Email Server [Electronic Health Record (EHR) Setup Guide Section 6.1]	Complete	Comments
Will configure at direct email onboarding	☐	

CIR [Electronic Health Record (EHR) Setup Guide Section 7.0]	Complete	Comments
Configure BEHOCIR SOURCES XPAR Parameter	☐	

Image Viewer [Electronic Health Record (EHR) Setup Guide Section 16.1]	Complete	Comments
Insert Object into EHR GUI	☐	

Optional Configuration

Education Component [Electronic Health Record (EHR) Setup Guide Section 9.0]	Complete	Comments
Configure BGO PROBLEM EDUCATION XPAR Parameter	☐	

Immunizations Component [Electronic Health Record (EHR) Setup Guide Section 10.1]	Complete	Comments
Setting up Local Eligibility Codes for Immunizations	☐	

PickList [Electronic Health Record (EHR) Setup Guide Section 11.3]	Complete	Comments
Assigning TIU Templates in IPL	☐	

SNOMED/CPT PickList [Electronic Health Record (EHR) Setup Guide Section 11.2]	Complete	Comments
BGO Default Picklist Lookup XPAR Parameter	☐	

TIU [Electronic Health Record (EHR) Setup Guide Section 11.3]	Complete	Comments
Build templates for care planning features	☐	